

***MAKING OPTIMUM USE OF THE ONLINE ASSESSMENT FOR
PROFESSIONAL FISCAL CAREERS:***

A GUIDE FOR HUMAN RESOURCES PROFESSIONALS

***MARYLAND DEPARTMENT OF BUDGET AND MANAGEMENT
OFFICE OF PERSONNEL SERVICES AND BENEFITS
RECRUITMENT AND EXAMINATION DIVISION***

February 2002

Accountant Trainee, I, II, Lead, Advanced, Lead Specialized, Supervisor I & Supervisor II

Agency Budget Specialist Trainee, I, II, Lead & Supervisor

Agency Grants Specialist Trainee, I, II, Lead & Supervisor

Financial Compliance Auditor Trainee, I, II, Lead, Supervisor & Program Supervisor

Fiscal Services Chief I & II

Fiscal Services Officer I & II

Internal Auditor Trainee, I, II, Lead, Officer, Supervisor & Program Supervisor

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PROFESSIONAL FISCAL CAREERS GUIDE FOR HUMAN RESOURCES PROFESSIONALS

Step-By-Step Checklist of the Selection Process for the Professional Fiscal Careers

This is a step-by-step summary of the process for maximizing the use of the Eligible Lists for the Professional Fiscal Careers (PFC). The process is depicted in flowchart form on the following page. It is also described in more detail on the following pages.

Refer to pages 4 & 5 for a complete list of the classifications covered by the PFC. This process for use of the Eligible Lists is important because it will add to the validity of the overall selection process. All of the attachments cited below can be hard copied from the back of this manual or downloaded from <http://www.opsb.state.md.us/pfc/pfc.htm>.

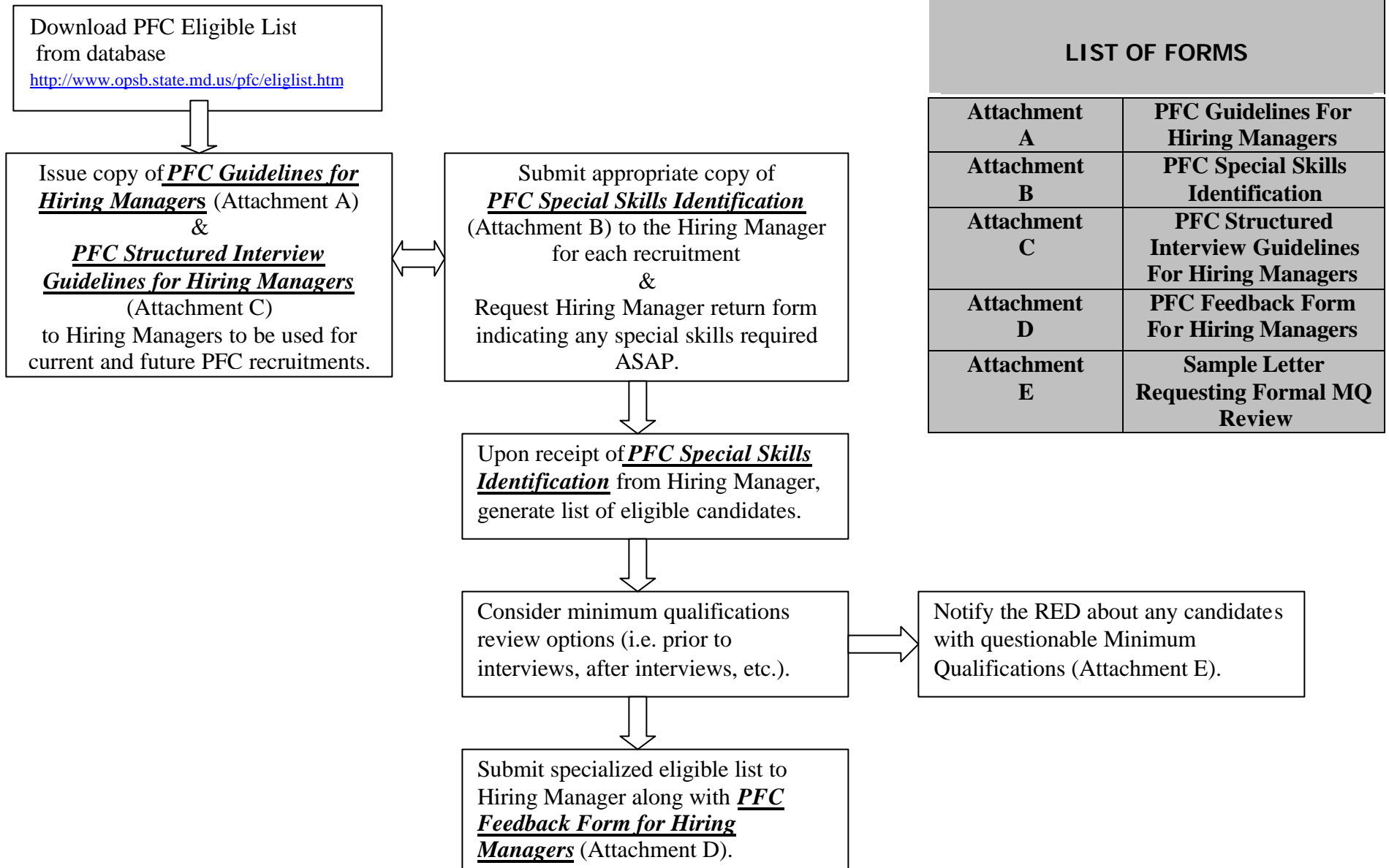
1. Download the PFC Eligible List in the typical manner. Downloading as a database, rather than a text file, will enhance your search capabilities for any special skills. To download these files, go to: <http://www.opsb.state.md.us/pfc/eliglist.htm>.
2. Submit a copy of Attachments A and C to the hiring manager. This needs to be done only one time, provided that the manager retains the copies you submit.
3. Submit the appropriate copy of Attachment B to the hiring manager. There is a different version of Attachment B for each classification except for the Trainee levels. (There are no Attachment B's for the Trainee levels.) This form should be resubmitted for every interview process the hiring manager undertakes. Request that the hiring manager return Attachment B to you as soon as possible to indicate any special skills he or she may require for the vacant position. Attachment B should be submitted to hiring managers at the same time as Attachments A and C. Please note that the hiring manager's Position Selection Plan must support the special skills (i.e., selective qualifications) selected.
4. Upon receipt of Attachment B, review the Pending Codes field on the Eligible List to identify which candidates have the required Special Skills. Generate a specialized interview list that contains only candidates who meet the special skill requirements that the hiring manager requested.
5. Consider how and when you would like to handle a review of Minimum Qualifications. Please see pages 7-9 of this document for more information about the necessity and options for this process.
6. Submit the specialized interview list to the hiring manager, along with Attachment D. A new copy of Attachment D will need to be resubmitted with every interview list the hiring manager receives.

7. Should you have any questions about the process, contact one of the following supervisors of the Recruitment and Examination Division (RED), Office of Personnel Services and Benefits:

Elliot Lasson	410-767-4928	elasson@dbm.state.md.us
Paige Glaze	410-767-4907	pglaze@dbm.state.md.us
Tanya Page	410-767-4909	tpage@dbm.state.md.us

We also welcome comments and suggestions for improving the process at pfc@dbm.state.md.us.

PFC Selection Process



Introduction

In January 2001, the Annual Salary Review (ASR) resulted in the development of several new accounting and auditing classifications, as well as in the development of other related classifications. These new classifications are found in the following series:

- Accountant Series
- Agency Grants Specialist Series
- Financial Compliance Auditor Series
- Fiscal Services Chief Series
- Fiscal Services Officer Series

It is the responsibility of the RED of the Office of Personnel Services and Benefits (OPSB), Department of Budget and Management (DBM), to develop assessment methodologies resulting in the generation of lists of eligible candidates for employment within the State of Maryland. In addition to the ASR, several other factors necessitated the development of new assessment procedures for the Professional Fiscal Careers. Over the past several years, the State of Maryland had experienced increasing competition with the private sector. It became evident that it was not only necessary to increase the salary rates for professional fiscal jobs but also to streamline the application process so that it was less burdensome and time-consuming for applicants. In addition, the RED had received frequent comments from hiring managers and HR professionals in various State agencies that Eligible Lists were becoming quickly exhausted and that few invited candidates were appearing for interview. In order to address these issues, the RED developed an online, open and continuous application and assessment process.

Several existing, related classifications were also included in this test development project in order to maintain consistency of all related classifications in the assessment process. These existing classifications are found in the following series:

- Agency Budget Specialist Series
- Internal Auditor Series

Classifications Assessed

The complete list of classifications assessed in the online assessment process for the Professional Fiscal Careers is noted here by functional area.

For General Accounting:

Accountant Trainee (4545)
 Accountant I (4546)
 Accountant II (4547)
 Accountant Lead (4548)
 Accountant Supervisor I (4551)

Fiscal Services Officer I (4534)
Fiscal Services Officer II (4535)

Fiscal Services Chief I (4536)
Fiscal Services Chief II (4537)

For Specialized Accounting:

Accountant Advanced (4549)
Accountant Lead Specialized (4550)
Accountant Supervisor II (4552)

For Internal Auditing:

Internal Auditor Trainee (4371)
Internal Auditor I (4372)
Internal Auditor II (4373)
Internal Auditor Lead (4374)
Internal Auditor Officer (4375)
Internal Auditor Supervisor (4376)
Internal Auditor Program Supervisor (4377)

For Financial Compliance Auditing:

Financial Compliance Auditor Trainee (4538)
Financial Compliance Auditor I (4539)
Financial Compliance Auditor II (4540)
Financial Compliance Auditor Lead (4541)
Financial Compliance Auditor Supervisor (4542)
Financial Compliance Auditor Program Supervisor (4543)

For Budgeting:

Agency Budget Specialist Trainee (0985)
Agency Budget Specialist I (0986)
Agency Budget Specialist II (0987)
Agency Budget Specialist Lead (0988)
Agency Budget Specialist Supervisor (0989)

For Grants Management:

Agency Grants Specialist Trainee (0805)
Agency Grants Specialist I (0806)
Agency Grants Specialist II (0807)
Agency Grants Specialist Lead (0808)
Agency Grants Specialist Supervisor (0809)

Nature and Structure of the Online Assessment Process

The application and assessment process for the Professional Fiscal Careers is located entirely online and is open and continuous. In other words, there is no closing date for applications. The Eligible Lists will be continuously updated as new candidates are certified. The assessment process for the Professional Fiscal Careers is a self-rating of job-related training, experience, certification and special skills, which relies upon the ability of candidates to evaluate correctly their qualifications given the questions presented. Because it is online, it will allow us to provide you with lists of candidates for interview in a more timely manner. Because it is a self-rating process, it is possible that there will be candidates on the Eligible Lists who do not meet the Minimum Qualifications (MQ's). Please see page 6 for more information regarding the review of MQ's.

When applicants visit the website, www.workformaryland.com, they will proceed through the following series of screens to complete the process required to place them on the Eligible Lists. Candidates' names should appear on the Eligible Lists within one week of completing the application and assessment process.

1. **Part I-A: Minimum Qualifications Review** – This is one set of questions, which applicants must answer in total, in order to be evaluated against the MQ's for all of the professional fiscal classifications. After completion of the MQ questionnaire, candidates will receive a list of the classifications for which they are qualified.
2. **Part I-B: Minimum Qualifications Results** – Candidates are given a list of the classifications for which they qualify. They are then asked to identify the classifications in which they are interested.
3. **Part I-C: Applicant Data** - Candidates are asked to provide the demographic information necessary to track them in the Sigma Applicant Management System and to generate their names on the Eligible Lists.
4. **Part II: Qualifications Supplement** – This portion of the assessment process determines the candidates' category placement on the Eligible Lists. Part II is divided into four functional areas: accounting, auditing, budgeting and grants management. Candidates will be presented only with the functional areas that pertain to the classifications in which they expressed interest. Candidates must answer all questions within a functional area to be evaluated for placement on the related Eligible Lists.
5. **Part III: Certification of Special Skills** – This portion of the assessment process is optional. It contained 23 online questions related to special skills. Candidates are asked to provide a self-rating of their highest level of education and/or experience for each special skill presented. When they are certified as having a special skill, a code will appear on the Eligible Lists. This portion of the assessment process will be very important in helping hiring managers to identify persons who are most qualified to work within their specific work areas. **Therefore, it is critical that human resources professionals communicate consistently and effectively with hiring managers to make use of Part III.** The appendix

of this manual contains several attachments that will facilitate your communication with hiring managers and will be explained in the manual in more detail later. The Position Selection Plan submitted by the hiring manager should support any request for a list of interviewees with special skills.

Minimum Qualifications Review

<i>The PFC Self-Certification Process was designed to meet two goals:</i>
1) Provide a Hiring Manager with a Eligible List that incorporates the Hiring Manager's specific qualification requirements
2) Shorten the time frame involved in the selection process
<i>The PFC Online Application accomplishes both these goals.</i>

Since each candidate is “self-certifying” their education and experience, the hiring agency needs to be aware that a candidate may overstate their qualifications. During an interview with a candidate, the Hiring Manager may discover that the candidate *did not actually perform a job function(s)* that was identified on the candidate’s online application. **Therefore, a review and verification of minimum qualifications is strongly recommended prior to final selection.**

Within most agencies, recruitments differ. One Hiring Manager may be on the outskirts of the State and be unable to wait for applications to be reviewed by HR and then mailed to their office. The Hiring Manager needs the applications sent directly to him or her. Another Hiring Manager may say that the application process is a “Human Resources function” and only want to see a list of names for interview. Therefore, the process for the review of MQ’s will ultimately be defined by the hiring agency. Several options are noted on the next page.

***** IMPORTANT NOTE *****

For each recruitment, the minimum qualifications **must** be verified for the appointee prior to the end of the probationary period as noted in the “*Secretary’s Guidelines on Verifications of Qualifications*.” Also note that, regardless of the option used to review MQ’s, when a candidate does not meet the MQ’s, agencies will need to notify the Director of the Recruitment and Examination Division, OPSB/DBM. In such instances, the Director of the Recruitment and Examination Division will ensure that a formal MQ review is conducted and that the candidate is removed from the Eligible List if necessary. Agency contact with the Recruitment and Examination Division OPSB/DBM should include the following information for each candidate who did not meet the MQ’s upon initial agency review:

- Name of candidate
- Social Security Number
- Classification applied for
- Copy of MS-100
- Process used to review the MQ’s

See Attachment E for a sample letter which contains all of the necessary elements agencies will need to communicate to the Recruitment and Examination Division when a candidate does not meet the MQ's based on the agency's initial review. This process of communicating with the Recruitment and Examination Division will be important in helping to maintain the integrity of the Eligible Lists. As noted above, there may be a higher incidence than usual of candidates not meeting the MQ's since the open and continuous, online application process for MQ's is a self-rating.

Various Options for the Review of Minimum Qualifications (For Illustrative Purposes):

1. HR Reviews MQ's Before Hiring Manager Interviews Candidates

- Human Resources (HR) asks candidate to send an MS-100 application to the HR Representative (Rep) prior to scheduling interviews.
- HR Rep reviews applications and schedules the interviews for candidates who meet the MQ's.
- HR Rep forwards a list of approved candidates to Hiring Manager for scheduling interviews.
- HR Rep notifies the Director of RED about any candidates who did not meet the MQ's upon agency review.

2. Hiring Manager and HR Review MQ's Before Selection

- In the interview letter, HR asks candidate to bring a completed MS-100 application with them to the interview.
- Hiring Manager performs preliminary review during interview process.
- Hiring Manager meets with HR Rep after interviews but before selection is made to confirm the MQ's of candidates considered for selection and to discuss any questionable MQ's. (Please note the MQ's are noted in Attachment B1, which the Hiring Manager should have received from the HR Rep upon request for an interview list.)
- HR Rep notifies the Director of RED about any candidates who did not meet the MQ's upon agency review.

3. Hiring Manager Reviews MQ's Before Selection; HR Reviews MQ's Before Job Offer

- In the interview letter, HR asks candidate to bring a completed MS-100 application with them to the interview.
- Hiring Manager performs preliminary review during interview process.
- Hiring Manager submits decision for selection with accompanying documentation to HR. In addition, Hiring Manager submits the names of any candidates with questionable MQ's. (Please note the MQ's are noted in Attachment B1, which the Hiring Manager should have received from the HR Rep upon request for an interview list.)
- HR Rep reviews the application of the selected candidate before a job offer is made.
- HR reviews the applications of any questionable candidates and notifies the Director of RED about any candidates who did not meet the MQ's upon agency review.

4. HR Rep Completes MQ Verification After Selection

- In the interview letter, HR asks candidate to bring a completed MS-100 application with them to the interview.
- Hiring Manager submits decision for selection with accompanying documentation to HR.
- Job offer is made.
- HR Rep conducts a verification of MQ's as outlined in the '*Secretary's Guidelines on Verifications of Qualifications*' prior to the end of the probationary period.
- HR Rep takes the necessary action for any candidate who does not meet the MQ's.

Special Note:

The above examples are provided as suggestions for verifying candidates' MQ's and/or selective qualifications required for the position.

However, agencies have a great deal of flexibility in how they go about that process. For example, Eligible Lists contain candidates' phone numbers. Agencies may decide to follow a structured telephone screening process to confirm candidate interest. The agency may ask candidates to fax a resume as part of the initial screening process prior to scheduling the interview.

Obviously, the possibilities are too numerous to outline here in this Guideline. The key issues to address relate to consistency in applying notification procedures, job-relatedness in terms of the inquiries made, and courtesy to the candidates by keeping them informed of the status of the recruitment. It is the responsibility of each appointing authority to ensure that all hires meet the minimum qualifications requirements for the position.

Certification of Special Skills

There are a total of twenty-three special skills for the professional fiscal classifications. When a candidate is certified for a special skill within a classification, a specific code will appear in the Pending Field on the Eligible List. The entire list of special skills and their corresponding codes as they will appear on the Eligible Lists is:

Special Skill	Pending Field Code
1. Budget Preparation	A
2. Budget Analysis	B
3. Cost Accounting	C
4. Debt Management (Bond and Loan Accounting)	D
5. Federal Fund Accounting	E
6. Special and Reimbursable Funds	F
7. Federal Fund Auditing	G
8. Special and Reimbursable Fund Auditing	H
9. Fiscal Notes	I
10. Financial Forecasting	J
11. Financial Reporting	K
12. Automated Accounting Systems	L
13. Information Technology Auditing	M
14. Grant Management	N
15. Grant/Contract Auditing	O
16. Investment Accounting	P
17. Procurement	Q
18. Tax Accounting	R

19. ADPICS	S
20. R*STARS	T
21. Management Projects	U
22. Supervision	V
23. Strategic Planning/Managing for Results	W

Hiring managers have the option of identifying special skill areas required for employment in their work area. Thus, they can request a specific Eligible List containing only candidates with the special skills they have identified in advance. Not all special skills pertain to every classification. Attachment B contains forms that should facilitate your interaction with hiring managers by linking each professional fiscal classification to its relevant special skills. There are no special skills for the Trainee levels. Hence there are no forms for the Trainee levels in Attachment B.

Communicating with Hiring Managers

It will be critical to provide hiring managers with adequate information about the selection process if you wish to make optimal use of the PFC Eligible Lists. The Appendix contains the Attachments noted below that can be used to communicate with hiring managers about the selection process for professional fiscal classifications. These Attachments are intended to facilitate your interaction with hiring managers by documenting the process for them so your time explaining the process is minimized.

1. **Attachment A: PFC Guidelines for Hiring Managers** – This is a form that provides information about the entire selection process for the professional fiscal careers as well as a list of all of the job classifications that are covered in the online assessment process for the professional fiscal careers. Each hiring manager should receive this form when a list of candidates for interview is requested.
2. **Attachment B: PFC Special Skills Identification** – This is a set of forms that includes one form for each professional fiscal classification (except for the Trainee levels, for which there are no special skills). Each form provides information about the entire selection process for the professional fiscal careers as well as a list of the relevant special skills or selective qualifications for the classification of interest. The MQ's for the classification are also noted. Finally, some forms contain information about important job elements that we were not able to assess as part of the online process. Hiring managers may wish to assess these job elements during the interview process.

When a list of candidates for interview is requested for a particular classification, the hiring manager should receive the corresponding form. The hiring manager should indicate which special skills are required or desirable for employment in his or her work area and return the form to you so that a specialized Eligible List can be generated.

3. **Attachment C: Structured Interview Guidelines for Hiring Managers** – This form provides general information about the structured interview process. It will help managers to develop a valid interview and to make efficient use of their time during the interview process. This form should be given to hiring managers at the same time as the appropriate form from Attachment B. It should be provided prior to the interview.
4. **Attachment D: PFC Feedback Form for Hiring Managers** – This form will be used to provide feedback to the Recruitment and Examination Division, OPSB/DBM about the effectiveness of the selection process. It will also serve as an avenue for hiring managers to indicate any evidence of inflated self-ratings that they may uncover during the interview process. Thus, it is an important mechanism that will help us to maintain the integrity of the Eligible Lists. It should be copied and given to the hiring manager when the list of candidates for interview is forwarded to the hiring manager.

PROFESSIONAL FISCAL CAREERS GUIDELINES FOR HIRING MANAGERS

General Overview of the Selection Process for the Professional Fiscal Careers:

A Note to Hiring Manager of the Professional Fiscal Classifications

The Recruitment and Examination Division of the Office of Personnel Services and Benefits, Department of Budget and Management, is pleased to announce a new, streamlined application and assessment process for the Professional Fiscal Careers (PFC). This form (Attachment A) is one of four forms that will assist you and agency human resources office in identifying qualified candidates. It will also help to maintain the integrity of the Eligible Lists for this new process. You should receive the forms noted below at the indicated intervals during the selection process. **Your use of these forms is entirely optional, but strongly encouraged.**

1. **Attachment A: PFC Guidelines for Hiring Managers** – You should receive this form from your agency human resources representative upon request of a list of candidates for interview. It is the form you are now reading. Please retain this form for your information. It will apply to this and all subsequent PFC candidates you wish to interview.
2. **Attachment B: PFC Special Skills Identification** – You should receive this form from your agency human resources representative upon request of a list of candidates for interview. Please note that there are no Special Skills Identification forms for the Trainee level in any series. Only a general list of candidates for interview is available for the Trainee levels.
3. **Attachment C: PFC Structured Interview Guidelines for Hiring Managers** – You should receive this form from your agency human resources representative upon request of a list of candidates for interview. Please retain this form for your information. It will apply to this and all subsequent PFC candidates you wish to interview.
4. **Attachment D: PFC Feedback Form for Hiring Managers** – You should receive this form from your agency human resources representative when the list of candidates for interview is forwarded to you.

The Selection Process

The application and assessment process for the PFC is located entirely online and is open and continuous. There is no closing date for applications. The Eligible List will be continuously updated as new persons are certified. Candidates' names should appear on the Eligible Lists within one week of completing the application and assessment process.

The assessment process for the Professional Fiscal Careers is a rating of job-related training, experience, certification and special skills. The entire process is one of self-rating and relies upon the ability of candidates to correctly evaluate their qualifications given the questions presented. Because it is online, it will allow us to provide you with lists of candidates for interview in a timelier manner. Because it is a self-rating process, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List. The MQ's for each classification are noted on Attachment B, which you should have received with these guidelines. In addition, the information that you provide to us on the PFC Feedback Form for Hiring Managers (Attachment D) will assist us in evaluating the effectiveness of this new assessment process.

To view the online application and assessment process for the PFC, visit www.workformaryland.com. If you are accessing the website for informational purposes only, be sure that you do not save your information when exiting. Otherwise, you may be evaluated as a viable candidate and your name may be placed on some of the Eligible Lists.

Classifications Assessed

The list of classifications assessed in the online assessment process for the Professional Fiscal Careers is noted here by functional area.

For General Accounting:

Accountant Trainee (4545)

Accountant I (4546)

Accountant II (4547)

Accountant Lead (4548)

Accountant Supervisor I (4551)

Fiscal Services Officer I (4534)

Fiscal Services Officer II (4535)

Fiscal Services Chief I (4536)

Fiscal Services Chief II (4537)

For Specialized Accounting:

Accountant Advanced (4549)
Accountant Lead Specialized (4550)
Accountant Supervisor II (4552)

For Internal Auditing:

Internal Auditor Trainee (4371)
Internal Auditor I (4372)
Internal Auditor II (4373)
Internal Auditor Lead (4374)
Internal Auditor Officer (4375)
Internal Auditor Supervisor (4376)
Internal Auditor Program Supervisor (4377)

For Financial Compliance Auditing:

Financial Compliance Auditor Trainee (4538)
Financial Compliance Auditor I (4539)
Financial Compliance Auditor II (4540)
Financial Compliance Auditor Lead (4541)
Financial Compliance Auditor Supervisor (4542)
Financial Compliance Auditor Program Supervisor (4543)

For Budgeting:

Agency Budget Specialist Trainee (0985)
Agency Budget Specialist I (0986)
Agency Budget Specialist II (0987)
Agency Budget Specialist Lead (0988)
Agency Budget Specialist Supervisor (0989)

For Grants Management:

Agency Grants Specialist Trainee (0805)
Agency Grants Specialist I (0806)
Agency Grants Specialist II (0807)
Agency Grants Specialist Lead (0808)
Agency Grants Specialist Supervisor (0809)

PFC SPECIAL SKILLS IDENTIFICATION
Accountant I (4546)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative : _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Accountant I** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the Eligible List to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Accountant I**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills (selective qualifications) you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Accountant I

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Budget Preparation** – Candidate possesses work experience in compiling and organizing financial data required to complete the preparation of a Division/Department budget.
- _____ **Budget Analysis** – Candidate possesses work experience in analyzing financial data to forecast the financial resources required to implement programs and submit recommendations for budget allocation.
- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Financial Forecasting** – Candidate possesses work experience in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate possesses work experience in generating reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and in making suggestions for changes to support current and anticipated user needs.
- _____ **Grant Management** – Candidate possesses work experience in coordinating and controlling the financial oversight of grant-funded programs for an agency according to applicable Federal, State and municipal regulations including expenditures, revenues, cash management and financial reporting.
- _____ **Investment Accounting** – Candidate possesses work experience in valuing and/or reporting on the investment activity related to a diversified investment portfolio.
- _____ **Procurement** – Candidate possesses work experience in coordinating and overseeing procurement and/or contract administration to ensure compliance with relevant regulations and policy.
- _____ **Tax Accounting** – Candidate possesses work experience in the review and analysis of business operations, financial records and other documents to determine compliance with Federal and/or Maryland tax laws.

- _____ **ADPICS** – Candidate possesses work experience in recording purchase orders and monitoring purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.
- _____ **R*STARS** – Candidate possesses work experience in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Accountant I

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Accountant I** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: One year of experience examining, analyzing and interpreting accounting systems, records and reports by applying generally accepted accounting principles.

Note:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant, **or** a master's degree in accounting from an accredited college or university may be substituted for the required experience.
3. Applicants may substitute one year of professional auditing experience for the required experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Accountant I

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Accountants in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to respond to questions about accounting discrepancies and to discuss and resolve problem areas with management
- Microsoft Word skills
- Microsoft Excel skills

PFC SPECIAL SKILLS IDENTIFICATION
Accountant II (4547)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Accountant II** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Accountant II**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Accountant II

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Budget Preparation** – Candidate possesses work experience in compiling and organizing financial data required to complete the preparation of a Division/Department budget.
- _____ **Budget Analysis** – Candidate possesses work experience in analyzing financial data to forecast the financial resources required to implement programs and submit recommendations for budget allocation.
- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Financial Forecasting** – Candidate possesses work experience in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate possesses work experience in generating reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and in making suggestions for changes to support current and anticipated user needs.
- _____ **Grant Management** – Candidate possesses work experience in coordinating and controlling the financial oversight of grant-funded programs for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **Investment Accounting** – Candidate possesses work experience in valuing and/or reporting on the investment activity related to a diversified investment portfolio.
- _____ **Procurement** – Candidate possesses work experience in coordinating and overseeing procurement and/or contract administration to ensure compliance with relevant regulations and policy.
- _____ **Tax Accounting** – Candidate possesses work experience in the review and analysis of business operations, financial records and other documents to determine compliance with Federal and/or Maryland tax laws.

- _____ **ADPICS** – Candidate possesses work experience in recording purchase orders and monitoring purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.
- _____ **R*STARS** – Candidate possesses work experience in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review.)
- _____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

<hr/> Name of Hiring Manager Please print or type	<hr/> Title
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_____ **Hiring Manager's Signature (required for approval)**

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Accountant II

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Accountant II** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Two years of experience examining, analyzing and interpreting accounting systems, records and reports by applying generally accepted accounting principles.

Note:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant, **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional auditing experience for one year of accounting experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Accountant II

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Accountants in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to respond to questions about accounting discrepancies and to discuss and resolve problem areas with management
- Microsoft Word skills
- Microsoft Excel skills

PFC SPECIAL SKILLS IDENTIFICATION
Accountant Advanced (4549)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Accountant Advanced** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Accountant Advanced**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Accountant Advanced

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

_____ **Cost Accounting** – Candidate possesses work experience in designing and establishing cost finding and reporting measures and in providing management with the financial basis for recovering actual overhead costs as well as cost and comparative analysis reports for evaluating the effectiveness of cost identification.

_____ **Debt Management (Bond and Loan Accounting)** – Candidate possesses work experience in establishing and maintaining accounting records for bonds and loans with differing maturity dates, interest rates, payments and amortization methods.

_____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).

_____ **Automated Accounting Systems** – Candidate possesses work experience in managing automated accounting systems, developing test scenarios and identifying required user system procedure modifications and enhancements.

_____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).

_____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Accountant Advanced

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for Accountant Advanced are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Three years of experience examining, analyzing and interpreting accounting systems, records and reports by applying generally accepted accounting principles.

Note:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant, **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional auditing experience for one year of accounting experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Accountant Advanced

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Specialized Accountants in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Developing corrective action plans in response to audit exceptions
- Developing and revising accounting policies
- Oral communication skills/interpersonal skills to discuss and resolve fiscal problems with management and/or with the public
- Microsoft Excel skills
- Microsoft Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Accountant Lead (4548)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Accountant Lead** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Accountant Lead**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Accountant Lead

Instructions: Please indicate which of these special skills (selective qualifications) are required or desirable for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Budget Preparation** – Candidate possesses work experience in compiling and organizing financial data required to complete the preparation of a Division/Department budget.
- _____ **Budget Analysis** – Candidate possesses work experience in analyzing financial data to forecast the financial resources required to implement programs and submit recommendations for budget allocation.
- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Financial Forecasting** – Candidate possesses work experience in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate possesses work experience in generating reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and in making suggestions for changes to support current and anticipated user needs.
- _____ **Grant Management** – Candidate possesses work experience in coordinating and controlling the financial oversight of grant-funded programs for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **Investment Accounting** – Candidate possesses work experience in valuing and/or reporting on the investment activity related to a diversified investment portfolio.
- _____ **Procurement** – Candidate possesses work experience in coordinating and overseeing procurement and/or contract administration to ensure compliance with relevant regulations and policy.
- _____ **Tax Accounting** – Candidate possesses work experience in the review and analysis of business operations, financial records and other documents to determine compliance with Federal and/or Maryland tax laws.

- _____ **ADPICS** – Candidate possesses work experience in recording purchase orders and monitoring purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.
- _____ **R*STARS** – Candidate possesses work experience in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Accountant Lead

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Accountant Lead** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Three years of experience examining, analyzing and interpreting accounting systems, records and reports by applying generally accepted accounting principles.

Note:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant, **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional auditing experience for one year of accounting experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Accountant Lead

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Accountants in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see Attachment C, PFC Structured Interview Guide for Hiring Managers, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to respond to questions about accounting discrepancies and to discuss and resolve problem areas with management
- Microsoft Word skills
- Microsoft Excel skills

PFC SPECIAL SKILLS IDENTIFICATION
Accountant Lead Specialized (4550)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Accountant Lead Specialized** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Accountant Lead Specialized**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Accountant Lead Specialized

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

_____ **Cost Accounting** – Candidate possesses work experience in designing and establishing cost finding and reporting measures and in providing management with the financial basis for recovering actual overhead costs as well as cost and comparative analysis reports for evaluating the effectiveness of cost identification.

_____ **Debt Management (Bond and Loan Accounting)** – Candidate possesses work experience in establishing and maintaining accounting records for bonds and loans with differing maturity dates, interest rates, payments and amortization methods.

_____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).

_____ **Automated Accounting Systems** – Candidate possesses work experience in managing automated accounting systems, developing test scenarios and identifying required user system procedure modifications and enhancements.

_____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).

_____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

<hr/> Name of Hiring Manager Please print or type	<hr/> Title
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Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Accountant Lead Specialized

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Accountant Lead Specialized** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Four years of experience examining, analyzing and interpreting accounting systems, records and reports by applying generally accepted accounting principles to include two years performing advanced duties in the areas of cost accounting, systems accounting, Federal fund accounting or bond and loan accounting

Note:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant, **or** a master's degree in accounting from an accredited college or university may be substituted for one year of general accounting experience.
3. Applicants may substitute one year of professional auditing experience for one year of general accounting experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Accountant Lead Specialized

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Specialized Accountants in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Developing corrective action plans in response to audit exceptions

- Developing and revising accounting policies
- Oral communication skills/interpersonal skills to discuss and resolve fiscal problems with management and/or with the public
- Microsoft Excel skills
- Microsoft Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Accountant Supervisor I (4551)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Accountant Supervisor I** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Accountant Supervisor I**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Accountant Supervisor I

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Budget Preparation** – Candidate possesses work experience in compiling and organizing financial data required to complete the preparation of a Division/Department budget.
- _____ **Budget Analysis** – Candidate possesses work experience in analyzing financial data to forecast the financial resources required to implement programs and submit recommendations for budget allocation.
- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Financial Forecasting** – Candidate possesses work experience in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate possesses work experience in generating reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and in making suggestions for changes to support current and anticipated user needs.
- _____ **Grant Management** – Candidate possesses work experience in coordinating and controlling the financial oversight of grant-funded programs for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **Investment Accounting** – Candidate possesses work experience in valuing and/or reporting on the investment activity related to a diversified investment portfolio.
- _____ **Procurement** – Candidate possesses work experience in coordinating and overseeing procurement and/or contract administration to ensure compliance with relevant regulations and policy.
- _____ **Tax Accounting** – Candidate possesses work experience in the review and analysis of business operations, financial records and other documents to determine compliance with Federal and/or Maryland tax laws.

- _____ **ADPICS** – Candidate possesses work experience in recording purchase orders and monitoring purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.
- _____ **R*STARS** – Candidate possesses work experience in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

<hr/> Name of Hiring Manager Please print or type	<hr/> Title
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_____ **Hiring Manager's Signature (required for approval)**

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Accountant Supervisor I

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Accountant Supervisor I** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Four years of experience examining, analyzing and interpreting accounting systems, records and reports by applying generally accepted accounting principles.

Note:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant, **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional auditing experience for one year of accounting experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Accountant Supervisor I

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Accounting Supervisors/Managers in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Formulating and implementing operating procedures and fiscal policies
- Developing and implementing corrective action plans in response to audit exceptions
- Oral communication skills/interpersonal skills to respond to questions about accounting discrepancies and to discuss and resolve problem areas with coworkers, management, auditors and supervisors
- Microsoft Excel skills
- Microsoft Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Accountant Supervisor II (4552)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Accountant Supervisor II** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Accountant Supervisor II**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Accountant Supervisor II

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

_____ **Cost Accounting** – Candidate has worked independently to design and establish cost finding and reporting measures and to provide management with the financial basis for recovering actual overhead costs as well as cost and comparative analysis reports for evaluating the effectiveness of cost identification.

_____ **Debt Management (Bond and Loan Accounting)** – Candidate has worked independently to establish and maintain accounting records for bonds and loans with differing maturity dates, interest rates, payments and amortization methods.

_____ **Federal Fund Accounting** – Candidate has worked independently to monitor the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).

_____ **Automated Accounting Systems** – Candidate has worked independently to manage automated accounting systems, develop test scenarios and identify required user system procedure modifications and enhancements.

_____ **Management Projects** – Candidate has worked independently to participate in or lead special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).

_____ **Supervision** – Candidate has worked independently in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Accountant Supervisor II

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Accountant Supervisor II** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Five years of experience examining, analyzing and interpreting accounting systems, records and reports by applying generally accepted accounting principles to include three years performing advanced duties in the areas of cost accounting, systems accounting, Federal fund accounting or bond and loan accounting.

Note:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required general accounting experience.
3. Applicants may substitute one year of professional auditing experience for one year of accounting experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Accountant Supervisor II

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Accounting Supervisors/Managers in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Formulating and implementing operating procedures and fiscal policies
- Developing and implementing corrective action plans in response to audit exceptions
- Oral communication skills/interpersonal skills to respond to questions about accounting discrepancies and to discuss and resolve problem areas with coworkers, management, auditors and supervisors
- Microsoft Excel skills
- Microsoft Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Agency Budget Specialist I (0986)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Agency Budget Specialist I** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Agency Budget Specialist I**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Agency Budget Specialist I

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Cost Accounting** – Candidate possesses work experience in designing and establishing cost finding and reporting measures and in providing management with the financial basis for recovering actual overhead costs as well as cost and comparative analysis reports for evaluating the effectiveness of cost identification.
- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Funds** – Candidate possesses work experience in monitoring the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Fiscal Notes** – Candidate possesses work experience in preparing, reviewing and justifying fiscal and economic impact analysis on legislative proposals (fiscal notes).
- _____ **Financial Forecasting** – Candidate possesses work experience in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate possesses work experience in generating reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and in making suggestions for changes to support current and anticipated user needs.
- _____ **Grant Management** – Candidate possesses work experience in coordinating and controlling the financial oversight of grant-funded programs for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **ADPICS** – Candidate possesses work experience in recording purchase orders and monitoring purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.

- _____ **R*STARS** – Candidate possesses work experience in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.
- _____ **Strategic Planning/Managing For Results** – Candidate possesses work experience in developing performance indicators and measuring actual performance for agency or organizational programs.

Name of Hiring Manager Please print or type	Title
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Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Agency Budget Specialist I

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Agency Budget Specialist I** are presented here for your convenience:

Education: Possession of a bachelor's degree from an accredited four-year college or university.

Experience: One year of experience in budget preparation, presentation and execution.

Note:

1. Applicants may substitute graduate education in accounting, business administration, economics, finance, political science or public administration at a rate of 30 semester hours for one year of required experience.
2. Applicants may substitute additional experience as defined above on a year for year basis for the required education.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in

conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Agency Budget Specialist I

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Agency Budget Specialists in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to discuss budget appropriations and provide guidance to managers, and to work cooperatively with coworkers, supervisors, management and the public
- Planning, organizing and prioritizing work
- Microsoft Excel skills
- Microsoft Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Agency Budget Specialist II (0987)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Agency Budget Specialist II** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Agency Budget Specialist II**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Agency Budget Specialist II

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Cost Accounting** – Candidate possesses work experience in designing and establishing cost finding and reporting measures and in providing management with the financial basis for recovering actual overhead costs as well as cost and comparative analysis reports for evaluating the effectiveness of cost identification.
- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Funds** – Candidate possesses work experience in monitoring the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Fiscal Notes** – Candidate possesses work experience in preparing, reviewing and justifying fiscal and economic impact analysis on legislative proposals (fiscal notes).
- _____ **Financial Forecasting** – Candidate possesses work experience in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate possesses work experience in generating reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and in making suggestions for changes to support current and anticipated user needs.
- _____ **Grant Management** – Candidate possesses work experience in coordinating and controlling the financial oversight of grant-funded programs for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **ADPICS** – Candidate possesses work experience in recording purchase orders and monitoring purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.

- _____ **R*STARS** – Candidate possesses work experience in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.
- _____ **Strategic Planning/Managing For Results** – Candidate possesses work experience in developing performance indicators and measuring actual performance for agency or organizational programs.

Name of Hiring Manager Please print or type	Title
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Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Agency Budget Specialist II

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Agency Budget Specialist II** are presented here for your convenience:

Education: Possession of a bachelor's degree from an accredited four-year college or university.

Experience: Three years of experience in budget preparation, presentation and execution.

Note:

1. Applicants may substitute graduate education in accounting, business administration, economics, finance, political science or public administration at a rate of 30 semester hours for one year of required experience.
2. Applicants may substitute additional experience as defined above on a year for year basis for the required education.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in

conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Agency Budget Specialist II

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Agency Budget Specialists in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to discuss budget appropriations and provide guidance to managers, and to work cooperatively with coworkers, supervisors, management and the public
- Planning, organizing and prioritizing work
- Microsoft Excel skills
- Microsoft Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Agency Budget Specialist Lead (0988)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Agency Budget Specialist Lead** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Agency Budget Specialist Lead**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Agency Budget Specialist Lead

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Cost Accounting** – Candidate possesses work experience in designing and establishing cost finding and reporting measures and in providing management with the financial basis for recovering actual overhead costs as well as cost and comparative analysis reports for evaluating the effectiveness of cost identification.
- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Funds** – Candidate possesses work experience in monitoring the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Fiscal Notes** – Candidate possesses work experience in preparing, reviewing and justifying fiscal and economic impact analysis on legislative proposals (fiscal notes).
- _____ **Financial Forecasting** – Candidate possesses work experience in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate possesses work experience in generating reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and in making suggestions for changes to support current and anticipated user needs.
- _____ **Grant Management** – Candidate possesses work experience in coordinating and controlling the financial oversight of grant-funded programs for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **ADPICS** – Candidate possesses work experience in recording purchase orders and monitoring purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.

- _____ **R*STARS** – Candidate possesses work experience in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.
- _____ **Strategic Planning/Managing For Results** – Candidate possesses work experience in developing performance indicators and measuring actual performance for agency or organizational programs.

Name of Hiring Manager	Title
Please print or type	

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Agency Budget Specialist Lead

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Agency Budget Specialist Lead** are presented here for your convenience:

Education: Possession of a bachelor's degree from an accredited four-year college or university.

Experience: Four years of experience in budget preparation, presentation and execution.

Note:

1. Applicants may substitute graduate education in accounting, business administration, economics, finance, political science or public administration at a rate of 30 semester hours for one year of required experience.
2. Applicants may substitute additional experience as defined above on a year for year basis for the required education.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in

conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Agency Budget Specialist Lead

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Agency Budget Specialists in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to discuss budget appropriations and provide guidance to managers, and to work cooperatively with coworkers, supervisors, management and the public
- Planning, organizing and prioritizing work
- Microsoft Excel skills
- Microsoft Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Agency Budget Specialist Supervisor (0989)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Agency Budget Specialist Supervisor** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Agency Budget Specialist Supervisor**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Agency Budget Specialist Supervisor

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Cost Accounting** – Candidate has worked independently to design and establish cost finding and reporting measures and to provide management with the financial basis for recovering actual overhead costs as well as cost and comparative analysis reports for evaluating the effectiveness of cost identification.
- _____ **Federal Fund Accounting** – Candidate has worked independently to monitor the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Funds** – Candidate has worked independently to monitor the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Fiscal Notes** – Candidate has worked independently to prepare, review and justify fiscal and economic impact analysis on legislative proposals (fiscal notes).
- _____ **Financial Forecasting** – Candidate has worked independently in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate has worked independently to generate reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and to make suggestions for changes to support current and anticipated user needs.
- _____ **Grant Management** – Candidate has worked independently to coordinate and control the financial oversight of grant-funded programs for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **ADPICS** – Candidate has worked independently to record purchase orders and monitor purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.

- _____ **R*STARS** – Candidate has worked independently in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate has worked independently to participate in or lead special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate has worked independently in a formal supervisory role, including performance evaluation, staffing and scheduling employees.
- _____ **Strategic Planning/Managing For Results** – Candidate has worked independently to develop performance indicators and measure actual performance for agency or organizational programs.

Name of Hiring Manager Please print or type	Title
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Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Agency Budget Specialist Supervisor

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Agency Budget Specialist Supervisor** are presented here for your convenience:

Education: Possession of a bachelor's degree from an accredited four-year college or university.

Experience: Five years of experience in budget preparation, presentation and execution.

Note:

1. Applicants may substitute graduate education in accounting, business administration, economics, finance, political science or public administration at a rate of 30 semester hours for one year of required experience.
2. Applicants may substitute additional experience as defined above on a year for year basis for the required education.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in

conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Agency Budget Specialist Supervisor

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Agency Budget Specialists in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to discuss budget appropriations and provide guidance to managers, and to work cooperatively with coworkers, supervisors, management and the public
- Planning, organizing and prioritizing work
- Microsoft Excel skills
- Microsoft Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Agency Grants Specialist I (0806)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Agency Grants Specialist I** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Agency Budget Specialist I**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Agency Grants Specialist I

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Cost Accounting** – Candidate possesses work experience in designing and establishing cost finding and reporting measures and in providing management with the financial basis for recovering actual overhead costs as well as cost and comparative analysis reports for evaluating the effectiveness of cost identification.
- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Funds** – Candidate possesses work experience in monitoring the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Financial Forecasting** – Candidate possesses work experience in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate possesses work experience in generating reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and in making suggestions for changes to support current and anticipated user needs.
- _____ **Automated Accounting Systems** – Candidate possesses work experience in managing automated accounting systems, developing test scenarios and identifying required user system procedure modifications and enhancements.
- _____ **Procurement** – Candidate possesses work experience in coordinating and overseeing procurement and/or contract administration to ensure compliance with relevant regulations and policy.
- _____ **ADPICS** – Candidate possesses work experience in recording purchase orders and monitoring purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.

- _____ **R*STARS** – Candidate possesses work experience in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Strategic Planning/Managing For Results** – Candidate possesses work experience in developing performance indicators and measuring actual performance for agency or organizational programs.

Name of Hiring Manager	Title
Please print or type	

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Agency Grants Specialist I

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Agency Grants Specialist I** are presented here for your convenience:

Education: Possession of a bachelor's degree from an accredited four-year college or university.

Experience: One year of experience in grant evaluation and monitoring or budget preparation, presentation and execution.

Note:

1. Applicants may substitute graduate education in accounting, business administration, economics, finance, political science or public administration at a rate of 30 semester hours for each year of the required experience.
2. Applicants may substitute additional experience as defined above on a year for year basis for the required education.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Agency Grants Specialist I

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Agency Grants Specialists in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see Attachment C, PFC Structured Interview Guide for Hiring Managers, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to negotiate grant terms with grantors; provide instruction on the completion of grant forms skills; and to interact w/coworkers and supervisors
- Written communication skills to write grant reports, instructions and justifications

PFC SPECIAL SKILLS IDENTIFICATION
Agency Grants Specialist II (0807)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Agency Grants Specialist II** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Agency Budget Specialist II**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Agency Grants Specialist II

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Cost Accounting** – Candidate possesses work experience in designing and establishing cost finding and reporting measures and in providing management with the financial basis for recovering actual overhead costs as well as cost and comparative analysis reports for evaluating the effectiveness of cost identification.
- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Funds** – Candidate possesses work experience in monitoring the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Financial Forecasting** – Candidate possesses work experience in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate possesses work experience in generating reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and in making suggestions for changes to support current and anticipated user needs.
- _____ **Automated Accounting Systems** – Candidate possesses work experience in managing automated accounting systems, developing test scenarios and identifying required user system procedure modifications and enhancements.
- _____ **Procurement** – Candidate possesses work experience in coordinating and overseeing procurement and/or contract administration to ensure compliance with relevant regulations and policy.
- _____ **ADPICS** – Candidate possesses work experience in recording purchase orders and monitoring purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.

- _____ **R*STARS** – Candidate possesses work experience in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Strategic Planning/Managing For Results** – Candidate possesses work experience in developing performance indicators and measuring actual performance for agency or organizational programs.

Name of Hiring Manager Please print or type	Title
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Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Agency Grants Specialist II

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Agency Grants Specialist II** are presented here for your convenience:

Education: Possession of a bachelor's degree from an accredited four-year college or university.

Experience: Three years of experience in grant evaluation and monitoring or budget preparation, presentation and execution.

Note:

1. Applicants may substitute graduate education in accounting, business administration, economics, finance, political science or public administration at a rate of 30 semester hours for each year of the required experience.
2. Applicants may substitute additional experience as defined above on a year for year basis for the required education.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Agency Grants Specialist II

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Agency Grants Specialists in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to negotiate grant terms with grantors; provide instruction on the completion of grant forms skills; and to interact w/coworkers and supervisors
- Written communication skills to write grant reports, instructions and justifications

PFC SPECIAL SKILLS IDENTIFICATION
Agency Grants Specialist Lead (0808)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Agency Grants Specialist Lead** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Agency Budget Specialist Lead**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Agency Grants Specialist Lead

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Cost Accounting** – Candidate possesses work experience in designing and establishing cost finding and reporting measures and in providing management with the financial basis for recovering actual overhead costs as well as cost and comparative analysis reports for evaluating the effectiveness of cost identification.
- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Funds** – Candidate possesses work experience in monitoring the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Financial Forecasting** – Candidate possesses work experience in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate possesses work experience in generating reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and in making suggestions for changes to support current and anticipated user needs.
- _____ **Automated Accounting Systems** – Candidate possesses work experience in managing automated accounting systems, developing test scenarios and identifying required user system procedure modifications and enhancements.
- _____ **Procurement** – Candidate possesses work experience in coordinating and overseeing procurement and/or contract administration to ensure compliance with relevant regulations and policy.
- _____ **ADPICS** – Candidate possesses work experience in recording purchase orders and monitoring purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.

- _____ **R*STARS** – Candidate possesses work experience in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Strategic Planning/Managing For Results** – Candidate possesses work experience in developing performance indicators and measuring actual performance for agency or organizational programs.

Name of Hiring Manager Please print or type	Title
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Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Agency Grants Specialist Lead

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Agency Grants Specialist Lead** are presented here for your convenience:

Education: Possession of a bachelor's degree from an accredited four-year college or university.

Experience: Four years of experience in grant evaluation and monitoring or budget preparation, presentation and execution.

Note:

1. Applicants may substitute graduate education in accounting, business administration, economics, finance, political science or public administration at a rate of 30 semester hours for each year of the required experience.
2. Applicants may substitute additional experience as defined above on a year for year basis for the required education.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel

Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Agency Grants Specialist Lead

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Agency Grants Specialists in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to negotiate grant terms with grantors; provide instruction on the completion of grant forms skills; and to interact w/coworkers and supervisors
- Written communication skills to write grant reports, instructions and justifications

PFC SPECIAL SKILLS IDENTIFICATION
Agency Grants Specialist Supervisor (0809)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Agency Grants Specialist Supervisor** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Agency Budget Specialist Supervisor**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Agency Grants Specialist Supervisor

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Budget Preparation** – Candidate has worked independently to compile and organize financial data required to complete the preparation of a Division/Department budget.
- _____ **Budget Analysis** – Candidate has worked independently in analyzing financial data to forecast the financial resources required to implement programs and submit recommendations for budget allocation.
- _____ **Cost Accounting** – Candidate has worked independently to design and establish cost finding and reporting measures and to provide management with the financial basis for recovering actual overhead costs as well as cost and comparative analysis reports for evaluating the effectiveness of cost identification.
- _____ **Federal Fund Accounting** – Candidate has worked independently to monitor the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Funds** – Candidate has worked independently to monitor the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Financial Forecasting** – Candidate has worked independently in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate has worked independently to generate reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and to make suggestions for changes to support current and anticipated user needs.
- _____ **Automated Accounting Systems** – Candidate has worked independently to manage automated accounting systems, develop test scenarios and identify required user system procedure modifications and enhancements.
- _____ **Procurement** – Candidate has worked independently in coordinating and overseeing procurement and/or contract administration to ensure compliance with relevant regulations and policy.

- _____ **ADPICS** – Candidate has worked independently to record purchase orders and monitor purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.
- _____ **R*STARS** – Candidate has worked independently in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate has worked independently to participate in or lead special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate has worked independently in a formal supervisory role, including performance evaluation, staffing and scheduling employees.
- _____ **Strategic Planning/Managing For Results** – Candidate has worked independently to develop performance indicators and measure actual performance for agency or organizational programs.

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Agency Grants Specialist Supervisor

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Agency Grants Specialist Supervisor** are presented here for your convenience:

Education: Possession of a bachelor's degree from an accredited four-year college or university.

Experience: Five years of experience in grant evaluation and monitoring or budget preparation, presentation and execution.

Note:

1. Applicants may substitute graduate education in accounting, business administration, economics, finance, political science or public administration at a rate of 30 semester hours for each year of the required experience.
2. Applicants may substitute additional experience as defined above on a year for year basis for the required education.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Agency Grants Specialist Supervisor

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Agency Grants Specialists in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see Attachment C, PFC Structured Interview Guide for Hiring Managers, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to negotiate grant terms with grantors; provide instruction on the completion of grant forms skills; and to interact w/coworkers and supervisors
- Written communication skills to write grant reports, instructions and justifications

PFC SPECIAL SKILLS IDENTIFICATION
Financial Compliance Auditor I (4539)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Financial Compliance Auditor I** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Financial Compliance Auditor I**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Financial Compliance Auditor I

Instructions: Please indicate if this special skill (selective qualification) is required for the vacant position in question.

_____ **Tax Accounting** – Candidate possesses work experience in the review and analysis of business operations, financial records and other documents to determine compliance with Federal and/or Maryland tax laws.

Name of Hiring Manager Please print or type	Title
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Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Financial Compliance Auditor I

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Financial Compliance Auditor I** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: One year of experience performing financial and compliance audits of a State agency, grantee, business or other entity.

Notes:

1. Applicants who had met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant **or** Certified Internal Auditor **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional accounting experience for the required experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in

conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Financial Compliance Auditor I

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Auditors in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see Attachment C, PFC Structured Interview Guide for Hiring Managers, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to interview management and operational personnel about accounting systems and internal controls; to discuss audit findings; and to interact w/coworkers and supervisors
- Written communication skills to write audit reports
- MS Excel skills
- MS Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Financial Compliance Auditor II (4540)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Financial Compliance Auditor II** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Financial Compliance Auditor II**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Financial Compliance Auditor II

Instructions: Please indicate if this special skill (selective qualification) is required for the vacant position in question.

_____ **Tax Accounting** – Candidate possesses work experience in the review and analysis of business operations, financial records and other documents to determine compliance with Federal and/or Maryland tax laws.

<hr/> Name of Hiring Manager Please print or type	<hr/> Title
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Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Financial Compliance Auditor II

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Financial Compliance Auditor I** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Two years of experience performing financial and compliance audits of a State agency, grantee, business or other entity.

Notes:

1. Applicants who had met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant **or** Certified Internal Auditor **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional accounting experience for one year of auditing experience only.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in

conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Financial Compliance Auditor II

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Auditors in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see Attachment C, PFC Structured Interview Guide for Hiring Managers, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to interview management and operational personnel about accounting systems and internal controls; to discuss audit findings; and to interact w/coworkers and supervisors
- Written communication skills to write audit reports
- MS Excel skills
- MS Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Financial Compliance Auditor Lead (4541)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Financial Compliance Auditor Lead** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Financial Compliance Auditor Lead**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Financial Compliance Auditor Lead

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

_____ **Tax Accounting** – Candidate possesses work experience in the review and analysis of business operations, financial records and other documents to determine compliance with Federal and/or Maryland tax laws.

_____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

<hr/> Name of Hiring Manager Please print or type	<hr/> Title
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Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Financial Compliance Auditor Lead

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Financial Compliance Auditor Lead** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Three years of experience performing financial and compliance audits of a State agency, grantee, business or other entity.

Notes:

1. Applicants who had met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.

2. Possession of a certificate as a Certified Public Accountant **or** Certified Internal Auditor **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional accounting experience for one year of auditing experience only.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Financial Compliance Auditor Lead

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Auditors in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see Attachment C, PFC Structured Interview Guide for Hiring Managers, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to interview management and operational personnel about accounting systems and internal controls; to discuss audit findings; and to interact w/coworkers and supervisors
- Written communication skills to write audit reports
- MS Excel skills
- MS Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Financial Compliance Auditor Supervisor (4542)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Financial Compliance Auditor Supervisor** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Financial Compliance Auditor Supervisor**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Financial Compliance Auditor Supervisor

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

_____ **Tax Accounting** – Candidate possesses work experience in the review and analysis of business operations, financial records and other documents to determine compliance with Federal and/or Maryland tax laws.

_____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).

_____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

_____ **Strategic Planning/Managing For Results** – Candidate possesses work experience in developing performance indicators and measuring actual performance for agency or organizational programs.

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Financial Compliance Auditor Supervisor

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Financial Compliance Auditor Supervisor** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Four years of experience performing financial and compliance audits of a State agency, grantee, business or other entity.

Note:

1. Applicants who had met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant **or** Certified Internal Auditor **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional accounting experience for one year of auditing experience only.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Financial Compliance Auditor Supervisor

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Auditors in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see Attachment C, PFC Structured Interview Guide for Hiring Managers, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to interview management and operational personnel about accounting systems and internal controls; to discuss audit findings; and to interact w/coworkers and supervisors
- Written communication skills to write audit reports
- MS Excel skills
- MS Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Financial Compliance Auditor Program Supervisor (4543)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Financial Compliance Auditor Program Supervisor** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Financial Compliance Auditor Program Supervisor**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Financial Compliance Auditor Program Supervisor

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

_____ **Tax Accounting** – Candidate has worked independently in the review and analysis of business operations, financial records and other documents to determine compliance with Federal and/or Maryland tax laws.

_____ **Management Projects** – Candidate has worked independently to participate in or lead special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).

_____ **Supervision** – Candidate has worked independently in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

_____ **Strategic Planning/Managing For Results** – Candidate has worked independently to develop performance indicators and measure actual performance for agency or organizational programs.

_____ Name of Hiring Manager Please print or type	_____ Title
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Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Financial Compliance Auditor Program Supervisor

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Financial Compliance Auditor Program Supervisor** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Four years of experience performing financial and compliance audits of a State agency, grantee, business or other entity.

Note:

1. Applicants who had met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant **or** Certified Internal Auditor **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional accounting experience for one year of auditing experience only.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Financial Compliance Auditor Program Supervisor

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Auditors in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see Attachment C, PFC Structured Interview Guide for Hiring Managers, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to interview management and operational personnel about accounting systems and internal controls; to discuss audit findings; and to interact w/coworkers and supervisors
- Written communication skills to write audit reports
- MS Excel skills
- MS Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Fiscal Services Chief I & II (4536, 4537)

To Be Completed By HR Representative

Agency Name and Code: _____

Classification Level Requested (I or II): _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classifications of **Fiscal Services Chief I and II** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Fiscal Services Chief I or II**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Fiscal Services Chief I and II

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Budget Preparation** – Candidate has worked independently to compile and organize financial data required to complete the preparation of a Division/Department budget.
- _____ **Budget Analysis** – Candidate has worked independently in analyzing financial data to forecast the financial resources required to implement programs and submit recommendations for budget allocation.
- _____ **Federal Fund Accounting** – Candidate has worked independently to monitor the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Funds** – Candidate has worked independently to monitor the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Federal Fund Auditing** – Candidate has worked independently to audit the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Financial Forecasting** – Candidate has worked independently in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate has worked independently to generate reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and to make suggestions for changes to support current and anticipated user needs.
- _____ **Grant Management** – Candidate has worked independently to coordinate and control the financial oversight of grant-funded programs for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.

- _____ **Investment Accounting** – Candidate has worked independently to value and/or report on the investment activity related to a diversified investment portfolio.
- _____ **Procurement** – Candidate has worked independently in coordinating and overseeing procurement and/or contract administration to ensure compliance with relevant regulations and policy.
- _____ **Tax Accounting** – Candidate has worked independently in the review and analysis of business operations, financial records and other documents to determine compliance with Federal and/or Maryland tax laws.
- _____ **ADPICS** – Candidate has worked independently to record purchase orders and monitor purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.
- _____ **R*STARS** – Candidate has worked independently in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate has worked independently to participate in or lead special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate has worked independently in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Fiscal Services Chief I and II

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Fiscal Services Chief I and II** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Four years of experience examining, analyzing and interpreting accounting systems, records and reports by applying generally accepted accounting principles.

Note:

1. Applicants who had met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant, **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional budgeting experience or one year of professional auditing experience for one year of the required experience only.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Fiscal Services Chief I and II

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Accounting Supervisors/Managers in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see Attachment C, PFC Structured Interview Guide for Hiring Managers, for some helpful tips on developing valid interview questions.

- Formulating and implementing operating procedures and fiscal policies
- Developing and implementing corrective action plans in response to audit exceptions
- Oral communication skills/interpersonal skills to respond to questions about accounting discrepancies and to discuss and resolve problem areas with coworkers, management, auditors and supervisors
- Microsoft Excel skills
- Microsoft Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Fiscal Services Officer I & II (4534, 4535)

To Be Completed By HR Representative

Agency Name and Code: _____

Classification Level Requested (I or II): _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classifications of **Fiscal Services Officer I and II** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Fiscal Services Officer I or II**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Fiscal Services Officer I and II

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Budget Preparation** – Candidate has worked independently to compile and organize financial data required to complete the preparation of a Division/Department budget.
- _____ **Budget Analysis** – Candidate has worked independently in analyzing financial data to forecast the financial resources required to implement programs and submit recommendations for budget allocation.
- _____ **Federal Fund Accounting** – Candidate has worked independently to monitor the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Funds** – Candidate has worked independently to monitor the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Federal Fund Auditing** – Candidate has worked independently to audit the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Financial Forecasting** – Candidate has worked independently in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Financial Reporting** – Candidate has worked independently to generate reports for users from the Financial Management Information System (FMIS) or from other ad hoc reporting tools, and to make suggestions for changes to support current and anticipated user needs.
- _____ **Grant Management** – Candidate has worked independently to coordinate and control the financial oversight of grant-funded programs for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.

- _____ **Investment Accounting** – Candidate has worked independently to value and/or report on the investment activity related to a diversified investment portfolio.
- _____ **Procurement** – Candidate has worked independently in coordinating and overseeing procurement and/or contract administration to ensure compliance with relevant regulations and policy.
- _____ **Tax Accounting** – Candidate has worked independently in the review and analysis of business operations, financial records and other documents to determine compliance with Federal and/or Maryland tax laws.
- _____ **ADPICS** – Candidate has worked independently to record purchase orders and monitor purchasing activities using the MD State purchasing system, **ADPICS (Advanced Purchasing and Inventory Control System)**.
- _____ **R*STARS** – Candidate has worked independently in recording and/or approving financial transactions in the MD State accounting and reporting system, **R*STARS (Relational Statewide Accounting and Reporting System)**.
- _____ **Management Projects** – Candidate has worked independently to participate in or lead special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate has worked independently in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Fiscal Services Officer I and II

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Fiscal Services Officer I and II** are presented here for your convenience:

Education: A bachelor's degree in Accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in Accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Three years of experience examining, analyzing and interpreting accounting systems, records and reports by applying generally accepted accounting principles.

Note:

1. Applicants who had met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant, **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional budgeting experience or one year of professional auditing experience for one year of the required experience only.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Fiscal Services Officer I and II

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job Accounting Supervisors/Managers in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Formulating and implementing operating procedures and fiscal policies
- Developing and implementing corrective action plans in response to audit exceptions
- Oral communication skills/interpersonal skills to respond to questions about accounting discrepancies and to discuss and resolve problem areas with coworkers, management, auditors and supervisors
- Microsoft Excel skills
- Microsoft Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Internal Auditor I (4372)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Internal Auditor I** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Internal Auditor I**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Internal Auditor I

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

_____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).

_____ **Federal Fund Auditing** – Candidate possesses work experience in auditing the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).

_____ **Special and Reimbursable Fund Auditing** – Candidate possesses work experience in auditing the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.

_____ **Information Technology Auditing** – Candidate possesses work experience in conducting financial and compliance audits and/or performance audits of information technology systems.

_____ **Grant/Contract Auditing** – Candidate possesses work experience in auditing grant-funded programs and/or contracts for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.

_____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Internal Auditor I

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Internal Auditor I** are presented here for your convenience:

Education: Possession of a bachelor's degree in accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: One year of experience conducting financial and operational internal audits that include elements for finance and compliance, economy and efficiency, and program results.

Notes:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant **or** Certified Internal Auditor **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional accounting experience for one year of auditing experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Internal Auditor I

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Auditors in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see Attachment C, PFC Structured Interview Guide for Hiring Managers, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to interview management and operational personnel about accounting systems and internal controls; to discuss audit findings; and to interact w/coworkers and supervisors
- Written communication skills to write audit reports
- MS Excel skills
- MS Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Internal Auditor II (4373)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Internal Auditor II** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Internal Auditor II**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Internal Auditor II

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Federal Fund Auditing** – Candidate possesses work experience in auditing the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Fund Auditing** – Candidate possesses work experience in auditing the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Information Technology Auditing** – Candidate possesses work experience in conducting financial and compliance audits and/or performance audits of information technology systems.
- _____ **Grant/Contract Auditing** – Candidate possesses work experience in auditing grant-funded programs and/or contracts for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Internal Auditor II

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Internal Auditor II** are presented here for your convenience:

Education: Possession of a bachelor's degree in accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Three years of experience conducting financial and operational internal audits that include elements for finance and compliance, economy and efficiency, and program results.

Note:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant **or** Certified Internal Auditor **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional accounting experience for one year of auditing experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Internal Auditor II

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Auditors in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to interview management and operational personnel about accounting systems and internal controls; to discuss audit findings; and to interact w/coworkers and supervisors
- Written communication skills to write audit reports
- MS Excel skills
- MS Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Internal Auditor Lead (4374) and Internal Auditor Officer (4375)

To Be Completed By HR Representative

Agency Name and Code: _____

Classification Level Requested (Lead of Officer): _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classifications of **Internal Auditor Lead and Officer** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the levels of **Internal Auditor Lead and Officer**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Internal Auditor Lead and Officer

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Federal Fund Auditing** – Candidate possesses work experience in auditing the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Financial Forecasting** – Candidate possesses work experience in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Special and Reimbursable Fund Auditing** – Candidate possesses work experience in auditing the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Information Technology Auditing** – Candidate possesses work experience in conducting financial and compliance audits and/or performance audits of information technology systems.
- _____ **Grant/Contract Auditing** – Candidate possesses work experience in auditing grant-funded programs and/or contracts for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Internal Auditor Lead and Officer

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Internal Auditor Lead and Officer** are presented here for your convenience:

Education: Possession of a bachelor's degree in accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Four years of experience conducting financial and operational internal audits that include elements for finance and compliance, economy and efficiency, and program results.

Note:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant **or** Certified Internal Auditor **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional accounting experience for one year of auditing experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Internal Auditor Lead and Officer

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Auditors in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to interview management and operational personnel about accounting systems and internal controls; to discuss audit findings; and to interact w/coworkers and supervisors
- Written communication skills to write audit reports
- MS Excel skills
- MS Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Internal Auditor Supervisor (4376)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Internal Auditor Supervisor** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Internal Auditor Supervisor**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Internal Auditor Supervisor

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Federal Fund Accounting** – Candidate possesses work experience in monitoring the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Federal Fund Auditing** – Candidate possesses work experience in auditing the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Fund Auditing** – Candidate possesses work experience in auditing the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Information Technology Auditing** – Candidate possesses work experience in conducting financial and compliance audits and/or performance audits of information technology systems.
- _____ **Grant/Contract Auditing** – Candidate possesses work experience in auditing grant-funded programs and/or contracts for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **Management Projects** – Candidate possesses work experience participating in or leading special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).
- _____ **Supervision** – Candidate possesses work experience in a formal supervisory role, including performance evaluation, staffing and scheduling employees.
- _____ **Strategic Planning/Managing For Results** – Candidate possesses work experience in developing performance indicators and measuring actual performance for agency or organizational programs.

Name of Hiring Manager

Please print or type

Title

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____

Phone Number: _____ - _____ - _____

Minimum Qualifications for Internal Auditor Supervisor

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Internal Auditor Supervisor** are presented here for your convenience:

Education: Possession of a bachelor's degree in accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Five years of experience conducting financial and operational internal audits that include elements for finance and compliance, economy and efficiency, and program results.

Notes:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant **or** Certified Internal Auditor **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional accounting experience for one year of auditing experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Internal Auditor Supervisor

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Auditors in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to interview management and operational personnel about accounting systems and internal controls; to discuss audit findings; and to interact w/coworkers and supervisors
- Written communication skills to write audit reports
- MS Excel skills
- MS Word skills

PFC SPECIAL SKILLS IDENTIFICATION
Internal Auditor Program Supervisor (4377)

To Be Completed By HR Representative

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative: _____

Phone Number of HR Representative: _____

Date Submitted to Hiring Manager: ____/____/____

Date Returned to HR Representative: ____/____/____

Date Interview List Forwarded to Hiring Manager: ____/____/____

A Note to Hiring Manager about the Certification of Special Skills

This portion of the assessment process was optional. Candidates were not required to complete it, but they were encouraged to do so. It contained 23 online questions related to special skills. Candidates were asked to provide a self-rating of the degree of education and/or experience for each special skill. Not all special skills are related to every classification. The special skills that are related to the classification of **Internal Auditor Program Supervisor** are listed on this form.

The method of ranking candidates on the Eligible List is very general in nature. As a hiring manager, this form will help you to further identify qualified candidates by narrowing down the interview list to those candidates who possess the special skills (selective qualifications) required for work in your specific vacancy. Please complete this form and submit it to your agency human resources representative as soon as possible. You will then receive a list of candidates for interview who have met the certification requirements for the special skills you identified at the level of **Internal Auditor Program Supervisor**. You are advised to make a copy of this form for your own records. You may wish to include one or more questions about the special skills you identified in your interview process in order to verify the candidates' self-ratings. Please note that the Position Selection Plan for the vacancy you are filling should reflect a need for the special skills you identify. Show these special skills in the Selective Qualifications section of the Position Selection Plan.

If you do not wish to select candidates who possess special skills, but prefer a general list of interview candidates, be sure to notify your HR representative so that a general list can be generated for you.

Special Skills for Internal Auditor Program Supervisor

Instructions: Please indicate which of these special skills (selective qualifications) are required for the vacant position in question. Focus on the most critical skills for successful job performance. Limiting the special skills will maximize the number of people available for interview. For example, you may wish to limit your selection to two or three of the most critical special skills.

- _____ **Budget Preparation** – Candidate has worked independently to compile and organize financial data required to complete the preparation of a Division/Department budget.
- _____ **Federal Fund Accounting** – Candidate has worked independently to monitor the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Federal Fund Auditing** – Candidate has worked independently to audit the receipt and disbursement of Federal funds in compliance with State and Federal legislation, rules, regulations and policies (e.g., CMIA).
- _____ **Special and Reimbursable Fund Auditing** – Candidate has worked independently to audit the receipt and disbursement of special and reimbursable funds in compliance with State legislation, rules, regulations and policies.
- _____ **Financial Forecasting** – Candidate has worked independently in analyzing records of past and present operations, trends, costs, estimated and realized revenues, administrative commitments, obligations and cash positions to prepare financial projections and identify trends.
- _____ **Information Technology Auditing** – Candidate has worked independently to conduct financial and compliance audits and/or performance audits of information technology systems.
- _____ **Grant Management** – Candidate has worked independently to coordinate and control the financial oversight of grant-funded programs for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **Grant/Contract Auditing** – Candidate has worked independently to audit grant-funded programs and/or contracts for an agency according to applicable Federal, State and municipal regulations, including expenditures, revenues, cash management and financial reporting.
- _____ **Management Projects** – Candidate has worked independently to participate in or lead special projects that combine fiscal responsibility with other disciplines (e.g., unit relocations, classification specification review).

_____ **Supervision** – Candidate has worked independently in a formal supervisory role, including performance evaluation, staffing and scheduling employees.

_____ **Strategic Planning/Managing For Results** – Candidate has worked independently to develop performance indicators and measure actual performance for agency or organizational programs.

Name of Hiring Manager Please print or type	Title
--	-------

Hiring Manager's Signature (required for approval)

Date Completed: ____/____/____ **Phone Number:** _____ - _____ - _____

Minimum Qualifications for Internal Auditor Program Supervisor

As noted in Attachment A, it is possible that there may be some candidates on the Eligible List that do not meet the Minimum Qualifications (MQ's) as they are stated in the classification specifications. The MQ's for **Internal Auditor Program Supervisor** are presented here for your convenience:

Education: Possession of a bachelor's degree in accounting from an accredited college or university or a bachelor's degree from an accredited college or university with 30 credit hours in accounting and related courses, including or supplemented by 3 credit hours in auditing.

Experience: Five years of experience conducting financial and operational internal audits that include elements for finance and compliance, economy and efficiency, and program results.

Notes:

1. Applicants who have met the requirements for admission to the CPA examination prior to July 1, 1974 will be considered to have met the educational requirement referenced above.
2. Possession of a certificate as a Certified Public Accountant **or** Certified Internal Auditor, **or** a master's degree in accounting from an accredited college or university may be substituted for one year of the required experience.
3. Applicants may substitute one year of professional accounting experience for one year of auditing experience.

If you should ever interview a candidate who does not appear to meet the MQ's, please be sure to communicate this to your agency HR representative. Your HR representative will work in conjunction with the Director of Recruitment and Examination at the Office of Personnel

Services and Benefits, Department of Budget and Management, to complete a thorough review and to determine whether or not the candidate needs to be removed from the Eligible List.

Other Critical Job Elements for Internal Auditor Program Supervisor

On occasion, job analysis identifies a critical aspect of the job that is not appropriately assessed by the method that is developed. A job analysis indicated that the job elements noted below are important to the job of Auditors in the State of Maryland, in general. We were not able to assess these job elements directly in the online rating of training and experience.

If these elements are indeed critical for satisfactory performance upon entry into the position for which you are interviewing and if the skill level of candidates is likely to be different, you may want to develop interview questions to assess them. The more specifically you can tailor your questions to reflect the work that is being done in your office, the better they will assess candidates. Please see **Attachment C, PFC Structured Interview Guide for Hiring Managers**, for some helpful tips on developing valid interview questions.

- Oral communication skills/interpersonal skills to interview management and operational personnel about accounting systems and internal controls; to discuss audit findings; and to interact w/coworkers and supervisors
- Written communication skills to write audit reports
- MS Excel skills
- MS Word skills

STRUCTURED INTERVIEW GUIDELINES FOR HIRING MANAGERS

Introduction

The hiring interview is a very important part of the selection process as it often serves as the final screening of candidates. From a legal standpoint, it is considered part of the decision making process that leads to making an offer of employment. It is governed by the same legal mandates as other selection processes. Therefore, it is important that the interview be conducted in a manner that is valid, legally defensible and that will compliment other selection processes that precede it. In order to accomplish this, the interview process should meet these criteria:

- Interview questions should focus on important job elements for the vacant position in question. Questions should focus on those job elements that the candidate will not have an opportunity to learn during the orientation period. The weighting (or final relative number of points given to questions) may vary for questions depending on the importance of job elements or all of the questions may receive the same weight.
- Interviewers should avoid non-job-related, pre-employment questions about age, disability, marital status, national origin, race, religious affiliation and sexual orientation. (Several examples of appropriate and inappropriate pre-employment questions are located at the end of this interview guide.)
- Interview questions should be challenging and designed to elicit a range of responses from excellent to poor.
- Interview questions should be clear and unambiguous. The complexity level of questions should be commensurate with job performance.
- In accordance with the Maryland State Personnel and Pensions Article, Section 7-102, a copy of the job description, describing the essential duties of the job and the standards for satisfactory performance should be provided to the candidate prior to the candidate accepting appointment to the position. Agencies may wish to provide all candidates with this information prior to the start of the interview.
- The interview process should be administered in a standardized, consistent manner to all candidates. All candidates should get the same questions in the same order. The same personnel should serve on the interview panel, if possible. The same interviewees should ask the same questions. Candidates should not be prompted or led to respond in a certain way. Interviewers should stick to the questions at hand.
- The interview should be scored in a standardized, consistent manner. If possible, benchmarks should be developed to provide interviewers with examples of good, average and poor responses to questions. The more specifically the benchmarks are tailored to the questions, the better. Candidate responses should be compared to the benchmarks and not to the responses of other candidates. (Some examples of benchmarks are presented later.)

- Multiple interviewers should rate candidates' responses independently, i.e., candidate responses should not be discussed between interviewers before the ratings are applied.
- Interviewers should meet ahead of time to review the questions and rating criteria so they can become familiar with selection process and so they can decide upon a protocol for the process.
- Reference checks and minimum qualifications review should be conducted prior to making an offer of employment.
- Final decisions about selection should be based on the interview results as well as on other relevant information, including the reference check, work history, technical qualifications and other required skills.

Types of Interview Questions

There are several different types of questions that can be used to elicit information about a wide variety of job-related qualifications. A brief summary with examples follows.

Job Knowledge – These questions often address the technical nature of the job or other specific job related knowledge, such as knowledge of relevant regulations and laws. They should cover areas that the candidate is expected to know upon hire. Some examples are:

Describe the differences between a financial compliance audit and an audit of economy and efficiency?

According to generally accepted accounting principles, how should encumbrances outstanding at the year-end be reported?

Please define program budgeting. What are its advantages and disadvantages compared to other types of budgeting?

Situational Judgment – These questions present work-related problems and are often used to assess a candidate's ability to react appropriately in a difficult situation. They can also be used to assess interpersonal skills. Some examples are:

You are conducting a tax audit of a private corporate entity when you discover some serious violations. How would you handle this situation?

You suspect that one of the bookkeepers in a unit you supervise might be embezzling funds? What would you do?

A program manager has been anxiously awaiting approval of her budget. You have just notified her that her budget has been approved. Your supervisor then tells you that funds have been reallocated and that the manager's budget must be cut. How would you handle this situation?

Work Experience – These questions ask candidates to describe their existing qualifications in a job related area. Questions might pertain to training, work experience or accomplishments. Hiring managers are advised to ask these types of questions to verify the self-ratings of candidates for those special skills that were used to identify qualified candidates on the Eligible List. This includes the skills you identified in Attachment B of these PFC Guidelines for Hiring Managers. Some examples are:

Please describe the objective, scope and methodologies of the most complex internal audit you have conducted.

Please describe your experience in developing test scenarios for automated accounting systems.

Please describe your experience in coordinating the financial oversight of a grant-funded program. What was the nature of the grant and what was your specific involvement?

Work Sample – These questions present candidates with actual samples of work and require that candidates demonstrate their skills during the interview process. Work samples should always reflect an important part of the job. In developing work samples, it is important to use materials that will place all candidates on an equal footing. For example, if you have candidates within your office applying for the position, you would not want to use specific content area that would place them at an advantage. Some examples of work samples for different functional areas include:

For Accounting – reconciliation problems, general ledger distributions, spreadsheet applications

For Auditing – writing samples, interpreting rules and regulations

For Budgeting – analyzing financial data, budget presentation

For All Areas – respond in writing to a written complaint, draft a report summary

Overall Ratings – These are ratings that apply to the candidate's presentation as a whole throughout the course of the interview. They usually concern oral communication skills and interpersonal skills. These ratings are usually applied at the end of the interview, using specific benchmarks to aid interviewers.

Sample Benchmarks

Benchmarks are examples of good, average and poor responses that help raters to anchor the candidates' responses according to expected job performance. Candidates need not respond exactly as stated in the benchmark in order to obtain the rating.

Benchmarks are developed by persons who are knowledgeable about the job. It also helps to have an understanding of the range of possible responses that might be obtained from the typical candidate pool. Benchmarks, as well as interview questions, are confidential materials and should be retained in a secure location. Most benchmark scales have 3 to 7 points. It is typical to leave some of the points undefined to allow for some middle ground in candidate responses. The benchmarks presented here are general in nature. The more specifically they can be tailored to the question, the more appropriate they will be for the interview process.

Sample Benchmark for Situational Judgment

Outstanding (5 points) – Consistently used mature judgment and clear reasoning to make feasible decisions free from the effects of personal biases; recognized and considered the ramifications for proposed solutions. (Add specific examples of an outstanding response that pertains to the question.)

Above Average (4 points)

Average (3 points) – Usually considered the most important aspects of a situation when making decisions; overlooked some of the less apparent facts and implications; generally followed the most obvious approach to resolving the problem. (Add specific examples of an average response that pertains to the question.)

Below Average (2 points)

Inadequate (1 point) – Made impractical or unacceptable decisions; emphasized unimportant factors in reaching a solution; failed to recognize the implications and consequences of the solutions offered. (Add specific examples of an inadequate response that pertains to the question.)

Sample Benchmark for Work Experience

Outstanding (5 points) - Candidate's experience and/or background related to the question were extensive. The response was extremely thorough, addressing all of the question's elements. A strong match for the position requirements was demonstrated. (Add specific examples of an outstanding response.)

Above Average (4 points)

Average (3 points) - Candidate's experience and/or background related to the question were sufficient. The response addressed most of the question's elements, but some additional training and development would be required. (Add specific examples of an average response.)

Below Average (2 points)

Inadequate (1 point) - Candidate's experience and/or background related to the question were clearly inadequate. Candidate may have failed to address most of the question. An acceptable match for the position requirements was NOT met. (Add specific examples of an inadequate response.)

Sample Benchmark for an Overall Rating of Oral Communication

Outstanding (5 points) – Uses good grammar; speaks loudly enough to be easily understood. Expresses ideas clearly and completely. Understands and listens well to what is said. Seldom or never uses colloquialisms. Provides information in an organized manner without rambling. Chooses appropriate words to express ideas, evidencing good vocabulary. Displays enthusiasm. Appropriately uses gestures and facial expressions.

Above Average (4 points)

Average (3 points) – Speaks clearly and can be heard. Uses good grammar. Expresses ideas adequately but not always thoroughly. Seldom uses colloquialisms. Is organized, but may occasionally stray from the main point. May need infrequent repetition or clarification of questions.

Below Average (2 points)

Inadequate (1 point) – Difficult to hear or understand. Gives disjointed, incomplete or vague responses. Does not clearly express ideas. Frequently uses bad grammar and/or colloquialisms. Often misses the point of a question. Rambles or is inattentive. Needs frequent repetition or clarification of questions. Limited vocabulary.

Sample Benchmark for an Overall Rating of Interpersonal Skills

Outstanding (5 points) – In addition to meeting the satisfactory criteria, shows understanding that unpleasant situations must be dealt with objectively; shows the ability to maintain control of a difficult interpersonal situation and to propose changes.

Above Average (4 points)

Average (3 points) – Demonstrates a general understanding that others must be treated with fairness, dignity and compassion; recognizes that explanations may need to be verified in order to be understood.

Below Average (2 points)

Inadequate (1 point) – Shows a lack of awareness of the needs of others; talks as though he/she has an adversarial relationship towards others; uses jargon without explanations; demonstrates lack of interpersonal control of situations.

Pre-Employment Questions

As noted in the Introduction, hiring managers should not ask questions related to age, disability, marital status, national origin, race, religious affiliation and sexual orientation. Some examples of appropriate and inappropriate questions are:

Age: Questions about age can lead to discrimination complaints under the Age Discrimination in Employment Act of 1967 (ADEA).

Don't Ask: How old are you? What is your date of birth?

Ask: Are you 18 years old or older? (Don't ask unless age is a job requirement.)

Note: The State application (MS100) requests this information on a voluntary basis for statistical purposes related to EEO; however, this section of the application should not be provided to the hiring manager or interview panel prior to making the hiring decision.

Arrests and Convictions: An arrest is no indication of guilt.

Don't Ask: Inquiries about a candidate's general arrest and conviction record.

Ask: Inquiries about a candidate's convictions that bear a direct relationship to the job and have not been expunged or sealed by the courts. Consideration should be given to the nature and recency of conviction as well as to rehabilitation. In appropriate cases, a background check is permitted. Determination of whether such a check is required should be made before applications are solicited, and all candidates should be advised that a background check will be performed.

Dependents: The purpose of such questions is often to explore what the employer believes to be a common source of absenteeism and tardiness.

Don't Ask: Inquiries regarding the number and ages of children, child care arrangements and/or family planning.

Disability: These questions can encourage potential discrimination complaints under the Americans with Disabilities Act of 1990.

Don't Ask: Do you have any physical problems or injuries?
How many days were you absent from work last year?
Have you ever filed a workers compensation claim?
Are you currently taking any medication?
Have you ever been treated for drug abuse?

Ask: Are you able to perform the essential functions of the job listed on the attached job description?

Note: The applicant can be asked to demonstrate how she/he would perform the job and with what accommodations. After a job offer, but before hire, an employer may require a medical examination for all similarly situated entering employees. Some positions are subject to random drug screening, and applicants should be so advised.

Driver's License: Inquiries may be perceived as discriminatory against certain groups if not job related. Ask about a valid driver's license only if driving is necessary to perform the essential functions of the job.

Economic Status: Rejection of applicants for economic status has been found to have an adverse impact on minorities. Therefore, it is important to ask such questions only when they are clearly job related. For example, financial status may be an important factor where the position deals with money since financial stress might be more likely to tempt an employee who is in financial distress.

Don't Ask: Questions about an applicant's credit rating, financial status, bankruptcy proceedings or past garnishments unless you can establish job relatedness.

Education: Dates of school attendance could reveal an applicant's age and create the potential for age discrimination under the ADEA. However, it is important to confirm educational background to establish that an employee meets the minimum qualifications requirements for the position. Instead of asking questions addressing dates of attendance, an employer should ask for verification of degrees or diplomas earned, or the highest level of education completed.

Don't Ask: What were your dates of attendance?

Ask: What is the highest level of education completed?

Height and Weight Standards: Minimum height and weight requirements have the foreseeable effect of adversely affecting certain groups and therefore are illegal unless the employer can demonstrate that the standard is reasonably necessary to the function of the job.

Marital Status: Refusing to hire someone because of marital status is a violation of Title VII of the Civil Rights Act (CRA) of 1964.

Don't Ask: Are you single, married, divorced or widowed?

Military Service: Questions about military status are acceptable. For example, the State application (MS100) requests proof of eligibility (DD214) for veterans status in order to award non-employees with additional points on the Eligible List. However, this information should not be provided to the hiring manager or interview panel prior to making the hiring decision unless it is clearly job related. Interview questions concerning military service should be avoided because they may violate veterans' reemployment and leave laws. In other words, asking such questions might lead to a perception that an interviewer failed to hire an individual based on responses indicating that s/he may be called to active duty in the near future.

Don't Ask: Inquiries regarding foreign military experience; dates, conditions and types of discharge; or draft classifications.

Ask: Job-related inquiries about military experience in the U.S. Armed Forces or state militia (e.g., branch, occupational specialty).

Name: Questions and comments about an applicant's name could reveal the applicant's lineage or national origin.

Don't Ask: That's an unusual name. What nationality is it?
What is your maiden name?

Ask: Have you ever worked or been educated under another name? (allowable - should be asked for every hire to effectively verify the employee's qualifications for the position)

National Origin: The Immigration Reform and Control Act and Title VII of the CRA of 1964 prohibit discrimination based on national origin and race.

Don't Ask: Are you a U. S. citizen? If not, do you have a current work permit? (unless U.S. citizenship is required for the position)
What language do you most commonly speak at home?

Ask: Are you legally eligible to work in the U.S.? (Verification will be required upon hire.)
This job requires fluent speaking and writing in English. Can you meet this requirement? (Ask only if required as bona fide occupational qualification.)

Professional Associations: Affiliation with a particular organization can be an indication of a person's race, religion, etc.

Don't Ask: What are the names of all the organizations, clubs and associations to which you belong?

Ask: Inquiries regarding membership in job-related organizations. Applicant may omit those which reveal race, religion, age, sex, disability, etc.

Race, Color: Title VII of the CRA of 1964 prohibits discrimination in employment based upon race and color.

Don't Ask: Inquiries regarding applicant's race, skin color, eyes, hair or other questions directly or indirectly indicating race or color.

Relatives: Such questions may reflect preference for friends or relatives of present employees.

Don't Ask: Do you have any relatives that work for this agency?

Ask: If employed in the position for which you have applied, would you be in a supervisory or subordinate relationship to any parent, spouse, sibling or child? (categories provided under Section 2-307 of SPP)

Religion: Title VII of the CRA of 1964 prohibits discrimination on the basis of religion.

Don't Ask: Inquiries regarding an applicant's religious denomination, affiliation, customs or religious holidays observed.

Ask: Inquiries regarding normal hours of work.

Residence: Such questions may discriminate against disadvantaged individuals if used in the selection process.

Don't Ask: Do you rent or own a home?

Sex: Title VII of the CRA of 1964 prohibits discrimination on the basis of sex except in the instances in which sex may be a bona fide occupational qualification. The Pregnancy Discrimination Act is part of Title VII.

Don't Ask: Are you pregnant? (This subject should be avoided completely.)
Do you have any children?
Are you planning a family or using birth control?

Ask: This job requires overnight travel. Would you be able to meet this requirement?

Will you be able to work overtime when needed? (Ask these questions only if required as a bona fide occupational qualification.)

Sexual Orientation: The Governor's Fair Practices Executive Order and Maryland law prohibits discrimination based on sexual orientation.

Don't Ask: Inquiries regarding an applicant's sexual orientation (e.g., heterosexuality, homosexuality or bisexuality)

References

Age Discrimination in Employment Act of 1967, 29 U.S.C. Section 621-634, as amended in 1978.

Americans with Disabilities Act of 1990, 42 U.S.C. Section 12101, as amended.

Annotated Code of Maryland, State Personnel and Pensions Article, Section 7-102.

Civil Rights Act of 1964, Title VII – Equal Employment Opportunity, 42 U.S. C. Section 2000e, as amended in 1972.

Davey, Bruce. Guidelines for Writing Oral Examination Questions. Unpublished document.

Immigration Reform and Control Act of 1986, United States Department of Justice, Immigration and Naturalization Service.

International Personnel Management Association Assessment Council (2001). Oral Examinations Seminar Participant's Manual. Section V – Rating Scales and Scoring, 14 – 17.

Maryland Department of Budget and Management (2001) DBM'S Procedure for Monitoring Personnel Transactions for EEO Purposes (Attachment # 2: Structured Interview Guidelines). Unpublished Document.

State of Maryland (1995). Executive Order 01.01.1995.19 Code of Fair Employment Practices.

State of Oklahoma, Office of Personnel Management (2001). Developing and Administering Structured Interviews.

Uniform Guidelines on Employee Selection Procedures (1978). 29 CFR Part 1607.1 – 1607.3.

***Professional Fiscal Careers Recruitment and Assessment Feedback Form
for Hiring Managers***

To Be Completed By Hiring Manager

Agency Name and Code: _____

Name of Hiring Manager: _____

Name of HR Representative/Contact: _____

Classification for which Recruitment was conducted: _____

A Note to Hiring Manager about this PFC Feedback Form

Please take a moment to complete this form after you have completed the interview process for the classification in question. The information you provide will be used to help the agency and the Recruitment and Examination Division, OPSB/DBM to evaluate the effectiveness of selection process and to identify areas that may require modification.

As stated in Attachment A, PFC Guide for Hiring Managers, this online assessment is a self-rating process during which candidates indicate their highest level of experience, education, training and certification in several job-related areas. This form will also serve as an avenue for you to indicate any evidence of inflated self-ratings by candidates that you may uncover during the interview process. Thus, it is an important mechanism that will help us to maintain the integrity of the Eligible List.

1. Interview Dates: _____

2. Number of Candidates Invited to the Interview Process: _____

3. Number of Candidates Interviewed During this Interview Process: _____

4. How long did it take you to receive the List of Candidates for Interview from the date you requested it? (Check one response below.)

☐ One week or less
☐ 15 to 21 days

☐ 8 to 14 days
☐ More than three weeks

5. How satisfied were you regarding the timeliness of receiving the List of Candidates for Interview?

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Not Satisfied Neutral Very Satisfied

Comments: _____

6. Did the timely receipt of the List of Candidates for Interview help you meet your agencies' internal Managing for Results (MFR) goal for completing the hiring process within a specific time frame?

☐ YES ☐ NO ☐ Does Not Apply

7. Did you seek candidates with Special Skills when you requested the List of Candidates for Interview?

☐ YES ☐ NO ☐ Not aware of option for Special Skills

(If you checked NO to this item, please skip items 8 & 9, and go on to item 10)

8. What specific Special Skill(s) did you seek when requesting the List of Candidates for Interview? (please list)

a. _____
b. _____
c. _____

9. How satisfied were you the level of ***Special Skills*** demonstrated by the candidates whom you interviewed for your vacant position? Consider if the candidates interviewed had the desired Special Skills you requested. If Not Satisfied, please comment below.

☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
Not Satisfied Neutral Very Satisfied

Comments: _____

- ☐ 1 ☐ 2 ☐ 3 ☐ 4 ☐ 5
 Not Satisfied Neutral Very Satisfied

- [illegible]

**Department of Budget & Management
Office of Personnel Services and Benefits
Director, Recruitment and Examination Division
301 W. Preston St.
Room 608
Baltimore, MD 21201
E-Mail Address: pfc@dbm.state.md.us**

**Maryland State Department of XXXXX
Human Resources Office
P. O. Box 123
Baltimore, Maryland 212XX**

January 1, 2002

Mr. Steven D. Serra, Director
Recruitment and Examination Division
Office of Personnel Services and Benefits
301 W. Preston Street, Room 608
Baltimore MD 21201-2365

Dear Mr. Serra:

Our agency recently conducted interviews for the position of Accountant I (4546). Both the Hiring Manager and I conducted a preliminary Minimum Qualifications review. Mr. Joe Smith, SS# 111-11-1111, was interviewed for this position on December 29, 2001. Based on our review of his application and the results of the interview process, Mr. Smith does not appear to meet the minimum qualifications for Accountant I. We would like to request that your office conduct a formal review of Mr. Smith's Minimum Qualifications for Accountant I to consider his removal from the Eligible List. The original application that he submitted is enclosed.

Please contact me at 410-555-5555, ext. 120 if you should require any additional information or clarification.

Sincerely,

Mary Jones
Personnel Officer I

Enclosure